

FIG. 1

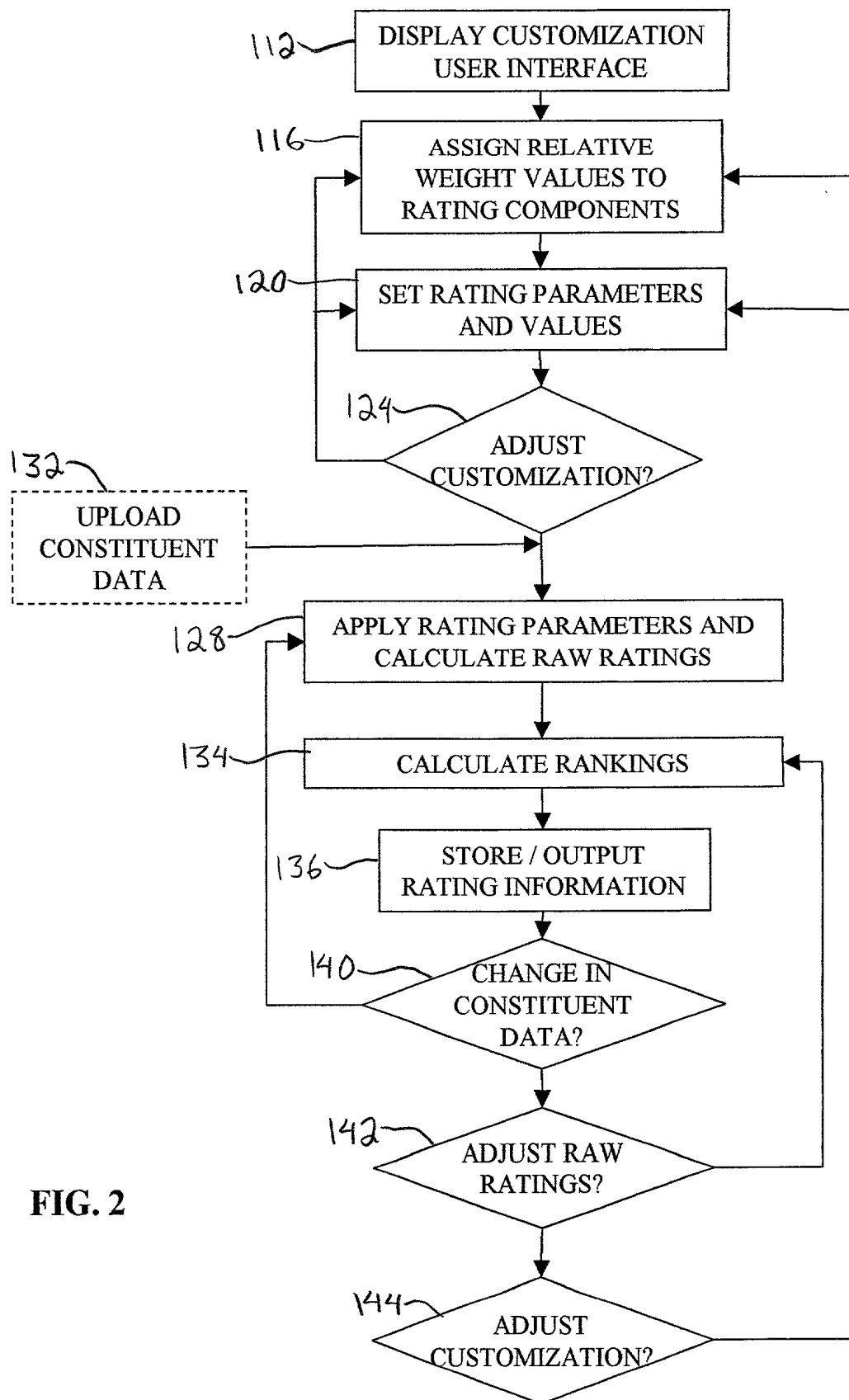


FIG. 2

✓ 30

Prospect rating settings

Step 1: Set relative weights for 3C categories and category elements

Category and elements	Category weight	Element weight
Commitment	34%	
Connection		34%
Gift Recency		33%
Gift Frequency		33%
Element Weights Subtotal		100%
Concern	33%	
Concerns and Interests		100%
Element Weights Subtotal		100%
Capacity	33%	
Average Gift Size		25%
Largest Gift Size		25%
Total Gift Size		25%
DataMagic Rating		25%
Element Weights Subtotal		100%
Category Weight Total	100%	

Step 2: Set parameters for commitment elements

Step 3: Set parameters for concern elements

Step 4: Set parameters for capacity elements

Save & new Save & done Cancel

FIG. 3

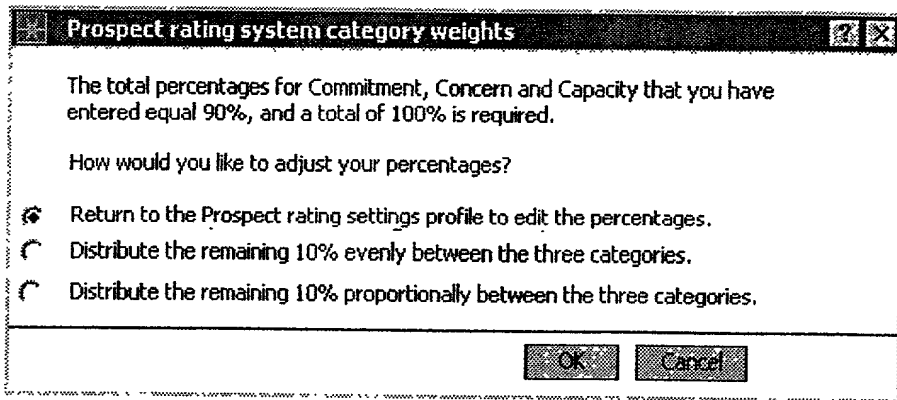
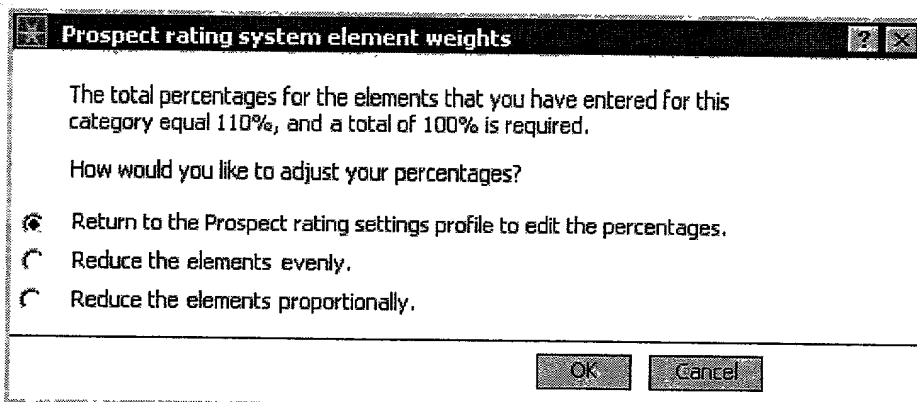
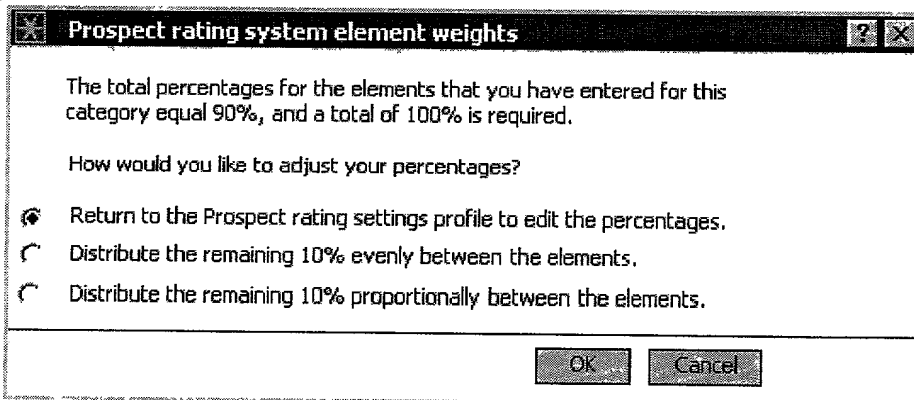
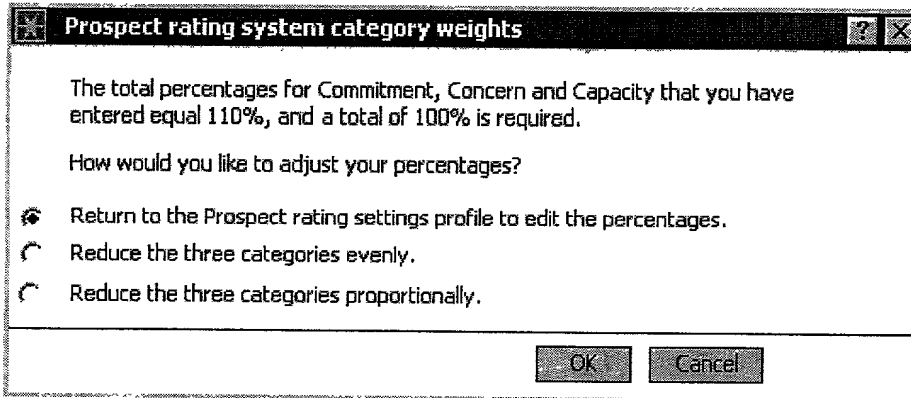


FIG. 4



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File Edit View Favorites Actions Help Find

Back Forward Home

Valley Academy

New
Delete
Duplicate
Refresh

Print & output
Print
Other output
Output options

Advanced find/search...
Perform search request

Valley Academy
Profile
Settings
Field customization
Prospect ratings settings
User profiles list
Tables list
Office documents
Database status

Go to...
Rating settings tab
Relative weighting
Commitment
Concern
Capacity

Prospect rating settings

☒ Step 1: Set relative weights for 3C categories and category elements

☐ Step 2: Set parameters for commitment elements

Connections	Priority level	3C Points (0-100)
Board of Directors	1	90
Alumni	2	100
Parent	3	85
Student	4	50
Staff	5	60
Volunteer	6	50
Friend	7	10
Grantor	8	10
Vendor	9	10

Gift recency	Period start	Period end	3C Points (0-100)
If the last gift was received within the last		6 months	100
If the last gift was received between the last	6 months	1 year	50
If the last gift received more than	1 year		25

Gift frequency	Range start	Range end	3C Points (0-100)
If the number of gift(s) received per year is greater than	8		100
If the number of gift(s) received per year is between	4	8	50
If the number of gift(s) received per year is less than	4		25

Save & new Save & done Cancel

FIG. 8

Period end

1 week
2 weeks
3 weeks
1 month
2 months
3 months
4 months
5 months
6 months
7 months
8 months
9 months
10 months
11 months
1 year
2 years
3 years
4 years
5 years
5+ years

FIG. 9

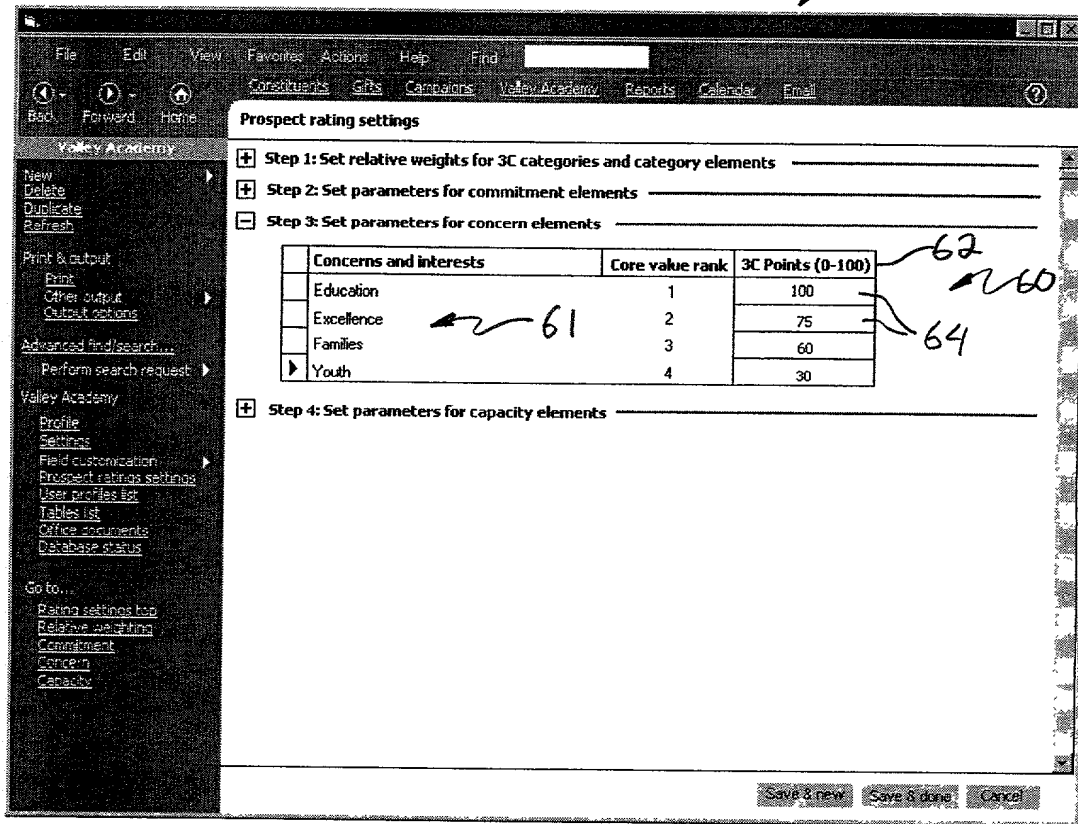


FIG. 10

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File Edit View Favorites Actions Help Find

Constituents Gifts Campaigns Valley Academy Reports Calendar Email

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Prospect rating settings

☒ Step 4: Set parameters for capacity elements

Average gift size	Range start	Range end	3C Points (0-100)
▶ If the average gift size is greater than	\$5,000		100
If the average gift size is between	\$1,000	\$5,000	50
If the average gift size is less than		\$1,000	25

Largest gift size	Range start	Range end	3C Points (0-100)
▶ If the largest gift size is greater than	\$10,000		100
If the largest gift size is between	\$5,000	\$10,000	50
If the largest gift size is less than		\$5,000	25

Total gift size	Range start	Range end	3C Points (0-100)
▶ If the total gift size is greater than	\$25,000		100
If the total gift size is between	\$10,000	\$25,000	50
If the total gift size is less than		\$10,000	25

DataMagic™ major gift code		
Elements	DataMagic™ code	3C Points (0-100)
High affluence, high affinity	A	100
High affluence, moderate affinity	B	75
High affluence, low affinity	C	60
▶ Major Gift Research Candidate	R	60

Save & new Save & done Cancel

Prospect rating settings step 4 data (10/10/01)

Fig. 11

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Prospect rating settings

DataMagic™ planned gift code	DataMagic™ code	3C Points (0-100)
High affluence, high affinity, 55+	A	
High affluence, moderate affinity, 55+	B	
High affluence, low affinity, 55+	C	
Planned Gift Research Candidate	R	

DataMagic™ affluence and affinity rating	DataMagic™ code	3C Points (0-100)
High affluence, high affinity	9	
High affluence, moderate affinity	8	
High affluence, low affinity	7	
Moderate affluence, high affinity	6	
Moderate affluence, moderate affinity	5	
Moderate affluence, low affinity	4	
Low affluence, high affinity	3	
Low affluence, moderate affinity	2	
Low affluence, low affinity	1	

Save & new Save & done Cancel

FIG. 12

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Prospect rating settings

DataMagic™ annual fund long term rating	DataMagic™ code	3C Points (0-100)
Special Handling	SH	
\$10,000+	90	
\$5,000 - \$9,999	80	
\$2,500 - \$4,999	70	
\$1,500 - \$2,499	60	
\$1,000 - \$1,499	50	
Potential \$1,000+	54	
\$500 - \$999	40	
\$250 - \$499	30	
\$100 - \$249	20	
Less than \$100	10	

Save & new Save & done Cancel

FIG. 13

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Mr. William A. Cote (Bill) - Parent - #6735 PRS#: 134/76%

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Prospect rating

Prospect rating	Raw rating	Rating as of	Percentile	Last ranked on
	134	3/23/01	76%	12/31/00

Commitment

Raw rating	Rating as of	Percentile	Adjustment comment
66	11/7/00		
25	3/23/01		
17	3/23/01		
0			
54	3/23/01	71%	

Concern

Raw rating	Rating as of	Percentile	Adjustment comment
190	8/29/00		
0			
48	8/29/00	85%	

Capacity

Raw rating	Rating as of	Percentile	Adjustment comment
20	3/23/01		
23	3/23/01		
15	3/23/01		
71	10/1/00		
0			
32	3/23/01	72%	

DataMagic™ information as of 10/1/00

Subject	Rating
Major gift code	Major Gift Research Candidate
Affluence and affinity rating	Moderate affluence, high affinity
Annual fund short term	Potential \$1,000+
Annual fund long term	\$5,000 - \$9,999

Save & new Save & done Save unfinished Cancel

FIG. 14

Bill Cote's Connections		
Connection	Priority level	3C points
Parent	3	85
Volunteer	6	50

OK

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FIG. 15

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<input type="checkbox"/> Changes to donor rating	— this week	▼	— edit —
Mr. David G. Beckham	83	+18	
Mrs. Sandra Fiddlesticks (Sandy)	77	+15	90
Lawrance L. Leong (Larry)	66	+12	
Mrs. Gerry Gerald	72	+11	
Ms. Catherine Cummings (Cathy)	50	+10	
Mr. Ernest H. Dunkins	66	-12	
Mark Mintor	59	-16	
Mrs. Lolla Vinquette	61	-17	

FIG. 16

Prospect rating parameters

Show prospects whose raw rating has changed by at least:

OK Cancel

Prospect rating parameter subwindow

FIG. 17

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Mr. Patrick F. Gregory (Pat)		Board of directors, Former		Rating: 92 Rank: 99%	
1200 Forest Glen Rd. Andover, MA 02133		Home: 978-343-7866 Work: 617-766-1210 x122 pgregory@mediaone.net		Volunteer Friend Commitment: 100 Concern: 95 Capacity: 98	
Most recent special goal		By date	Status	Comment	
Become part of Platinum club		Thu. 11/01/01	Active	Blah blah blah	
Contacts	Type	Date	Subject	Assigned to	
Last:	Call	Wed. 5/1/01	Discuss Discovery Phase Committee Appointees	Chris Seymour	
Next:	Appointment	Thu. 6/15/01	Lunch to discuss campaign pledge	Chris Seymour	
Giving summary		First	Last	Largest	Total
Amount		\$100	\$15,000	\$50,000	\$95,000
Date		12/12/92	4/1/01	7/10/99	6 years of consecutive giving 9 total years of giving

FIG. 18